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ABSTRACT

This guide, which is intended for human resources personnel, industry trainers, educators working in industry, and others interested in learning in the workplace, presents practical guidelines for maximizing the benefits of learning on the job by creating an effective learning environment in the workplace. Discussed in the introduction are key characteristics of learning environments, strategies for employer and employee survival in a changing world, and use of the manual. Part 1 details procedures for building networks of allies, collecting basic workplace information, and assessing personal learning experiences. Examined in part 2 are the following key characteristics of learning environments: building a shared vision, encouraging participation, taking a broad view of learning/training, developing individual learning plans, identifying skills and developing learning plans, recognizing/using mentoring, recognizing/rewarding learning, and allowing risk taking. Part 3 describes how the key characteristics were identified and provides a theoretical framework for creating learning environments in the workplace. Also included are numerous charts, exercises, and checklists, as well as a glossary. Contains 58 references. (MN)

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ED 380 545

Creating a learning environment in the workplace

A manual for managers, trainers, human resources personnel, union officials and workers

Anne Learmonth

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Anne Learmonth

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- What makes a workplace an effective learning environment?
- What are the benefits?
- Who benefits?
- How can a workplace improve its learning environment?

These are the questions this manual answers.

How does your workplace rate as a learning environment?

Does it have	Yes	No
• a shared strategic vision?		
• an industrial relations policy based on cooperation rather than conflict?		
• a team approach to work organisation?		
• an emphasis on employee development?		
• individual learning or development plans for employees?		
• a process for recognising or rewarding learning?		
• an open approach to experimenting or risk taking?		
• a training program which recognises and values informal on-the-job learning as well as formal training?		

If you can answer yes to some or all of these questions your workplace is already exhibiting some key characteristics of an effective workplace learning environment.

The following pages provide tools to help you encourage your workplace to develop these characteristics.

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Foreword

This research report draws together old and new information about creating an effective learning environment in the workplace.

It is a timely report. The value of learning on the job has always been well understood by some people.

Today, it is not an exaggeration to say it has become a pre-eminent industrial concern. A highly and constantly skilled flexible workforce is viewed as essential in most areas of manufacturing and the growing service industries.

The people who contributed to the report are aware that effective learning on the job is a constant and dynamic process. It requires the investment of time, money and effort. This report has been designed as a useful and practical guide about how to maximise the benefits of learning on the job by creating an effective learning environment in the workplace.

The report is designed for human resources personnel, industry trainers, TAFE and higher education personnel working in industry, managers, union officials and individuals interested in learning in the workplace.

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Chair, Steering Committee

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Industry consultations

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Australian Venue Services Catering

Autoliv Australia Pty Ltd

City of Werribee

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Introduction

- Key characteristics of a learning environment
- Surviving in a changing world
- How to use this manual

Introduction

Key characteristics of a learning environment

This manual identifies seven key characteristics of an effective workplace learning environment and demonstrates the essential stages in creating one. It is the result of a research project conducted for the National Centre for Vocational Education Research.

Information from workplaces was combined with the results from Australian and international research to provide answers to the following frequently asked questions.

- What part can training play in improving productivity in the workplace?
- How can this workplace meet the learning needs of its workers and make the best use of their skills and experience?

Surviving in a changing world

Australian employers, workers and unions are going through a period of profound change. To cope with technological advances, the globalisation of markets and increased demands for customised products, management practices have had to change to ensure the survival of the enterprise. Flatter management structures, devolution of responsibility for quality control and operations, and the participation of workplace teams in planning and decision making are becoming common across all industry sectors. The prospect of increasing productivity through better utilisation of the current workforce is leading managements to seek to maximise the skills of their employees through multi-skilling.

Leading the way are many workplaces which recognise that their greatest asset is their current workforce and which are developing broadly based learning programs that fully utilise the skills, knowledge and experience of their workers. As they instigate changes in work organisation and negotiate enterprise or industry agreements reflecting these changes, these employers have recognised that providing continuous learning opportunities for their employees is essential.

Identifying the skills and attributes needed in the workplace then becomes a central part of the planning process, as does developing a learning program that enables workers to acquire the necessary new skills and put them into practice.

Workplaces leading the way in this process are seen as having an effective workplace learning environment.

The seven key characteristics common to these workplaces are:

- The organisation has a clear shared vision which has been developed with the participation of employees and is constantly in the forefront of all activity and planning. The shared vision leads to the development of a mission statement, a business plan and a set of strategies for achieving the goals of the organisation.
- The organisation values and encourages participation in all its activities and operates within an industrial relations framework that focuses on co-operation and not on conflict. It operates with a flat management structure and organises work through self-managing teams.
- The organisation takes a broad view of learning, recognising that training is only part of the learning that takes place in every workplace. It identifies the skills required to meet its corporate goals and develops a wide range of learning programs to enable its employees to acquire these skills.
- The organisation encourages its employees to identify their skills and their individual learning goals and assists them to meet these goals through providing access to a wide range of learning opportunities.
- The organisation encourages skilled and experienced employees to share their skills and knowledge by providing training and support for them to engage in training others or in mentoring or coaching programs. It ensures that supervisors and middle managers are responsible for organising the appropriate training and learning opportunities for their staff.
- The organisation encourages experimentation and risk taking and accepts that failure can be a valuable learning experience. The organisation ensures that lessons learnt are used positively to modify its behaviour.
- The organisation responds to the development that occurs through learning by recognising and rewarding achievement and by reflecting the changes it produces in structures and processes.

In this manual a distinction is drawn between the words **learning** and **training**.

Learning is used as the general term, describing the whole range of experiences, activities and processes through which people acquire new skills and knowledge.

Training is used to describe such activities as classes, structured instruction through self-paced learning materials or competency based programs designed to teach specific skills.

How to use this manual

This manual is intended to be used by

- small to medium sized workplaces;
- producers of many different kinds of goods and services;
- workplaces well on the path to becoming learning organisations; and
- those which are at a very early stage of analysing their learning needs and deciding what to do about meeting them.

It may also be useful to discrete units of larger organisations with the responsiblity for determining the learning goals of the unit.

The manual is structured so that it can be worked through from start to finish or alternatively, selected parts may be used in combination with other material.

Some organisations using the manual may have already developed their own shared vision or have implemented a total quality management program. Others may be developing a training plan in response to award restructuring or setting up a new organisational structure. This initial starting position will determine how the manual is used.

The material which follows is designed to assist organisations to make decisions about

- how they wish to change;
- what strengths they can use and build on; and
- which path they wish to follow in developing a better learning environment.

Part 1 encourages readers to collect basic information about their own workplace and use this information to plan further action.

Part 2 provides a series of exercises which will assist the workplace to build a shared vision, identify learning resources, needs and opportunities and develop strategies for implementing an effective learning environment.

Part 3 describes in more detail how the key characteristics were identified and provides a theoretical framework. The characteristics, outlined in Part 1, are compared with those developed by other researchers, both in Australia and overseas. Readers with an interest in the background to the propositions contained in the manual may find it useful to turn straight to Part 3. A list of references, a glossary and suggestions for further reading complete the manual.

This manual is **not** designed as a series of step by step instructions. Short questionnaires and checklists are scattered throughout. These are intended to enable readers to identify which processes and activities will be useful in their particular circumstances.

Part 1
Where are we now?

- Building a network of allies
- Collecting basic workplace information
- Planning the next steps

Part 1
Where are we now?

This section is directed at you, the initial reader. How you use the manual will be largely determined by who you are and what role you play in your organisation. First of all you need to assess realistically where you stand in relation to the power in your organisation.

If you are the chief executive or training manager and you wish to make your organisation a better learning environment you might have the power to make the necessary changes and persuade others to support them. However you will probably find it easier and more effective if you take the time to develop support for your plan and involve others in it from the very early stages. You may wish to devolve the responsibility for planning and implementing new learning programs, but it is vital that your support is clearly demonstrated to all members of your workforce.

If you are not the chief executive you will certainly need the support and involvement of others if you are to succeed. You will need to identify likely supporters and allies and encourage them to work with you in achieving change. It is essential that you have the support of your chief executive and senior management and that they are consulted and kept fully informed at all times.

Developing a good learning environment in a workplace requires a range of changes in practice, organisational structure and in people's thinking. Like any change process it will be slow, difficult and threatening to many of the participants. If there are already changes going on in your workplace you may be able to include a change in the way learning is organised as part of the overall change. Alternatively, you may decide that it is better to keep the processes separate. Consequently, you will need to reach agreement on which changes have the highest priority for the organisation.

The following pages contain a series of questionnaires:

- My position
- Basic workplace information 1-3
- Current workplace learning 1-4
- Workplace policies 1-2

By working through these you will locate your workplace within a framework which will help you to decide which are the most appropriate steps to take next.

To locate yourself within your organisation and to start clarifying your aims, the first questions you need to answer are:

My position

What is my position in this workplace?

Do I believe that the learning/training processes need to be changed?

If so, in which ways?

Do I have responsibility for organising learning/training?

Am I alone in thinking that change is required?

What allies do I need?

How do I enlist them?

Does this workplace contain all the expertise we will need or do we need to find a facilitator for this process from outside?

By answering these basic questions you have **started** to:

- identify the ways in which you would like to see your workplace change its training/learning practices;
- identify which individuals or groups will need to support and endorse your actions;
- identify which individuals or groups will be allies; and
- plan strategies that you might use to encourage these others to join you.

In some workplaces it may be desirable to employ a facilitator to assist in managing the change process. There are three major reasons for doing so.

A facilitator may

- supply skills and expertise not otherwise available;
- provide an outsider viewpoint and information about how comparable organisations have structured change;
- act as a non-aligned negotiator or arbitrator if required.

Employer organisations, peak union bodies, management consultants and industry training boards can assist with identifying facilitators with the most appropriate experience.

An experienced facilitator will have developed a series of processes for managing organisational changes of this type. He or she will parallel the suggestions made in this volume but the approach may be very different in detail. The rest of this manual assumes that the workplace has decided it has the skills to proceed independently.

Building a network of allies

The most obvious place to seek allies will be in any existing training committee. However you will probably also need to enlist people from other parts of your workplace. Who they are may be determined by the type of changes you identified as necessary in the third question of the 'My position' questionnaire.

You will first need to seek support from your CEO and senior management for the formation of a small team to work on collecting information and ideas and defining the type of change that is the most appropriate starting point.

A well-balanced team typically has members with a wide range of skills and should work with any existing participative structures in the workplace. How these people are selected and enlisted will depend on existing processes.

Some of the kinds of people who should be involved are:

- key decision makers and people already involved in training and/or learning;
- representatives of stakeholders such as:
  - managers, supervisors and workers
  - other relevant parties such as union representatives, training and human resources personnel

- creative and lateral thinkers and those committed to change.

It is vital that key decision makers and those already working in existing training programs are involved from the beginning. Without their support and advocacy any proposal for change will fail. It is also essential that the team you are assembling is recognised by senior management and receives some assurance that its findings and recommendations will be carefully considered and acted upon.

Managing change well requires making sure that the following actions are taken:

- recognising and using the skills and knowledge of the team;
- seeking agreement and setting limits on the amount of time people are expected to contribute;
- jointly developing goals, terms of reference and time frames;
- where possible providing opportunities for members of the team to learn and use new skills;
- facilitating discussion and the participation of all team members;
- reporting regularly to the workplace on the progress made by the team;
- consulting as widely as possible.

The time and care taken in establishing a team of allies and in confirming that it has authority to investigate and recommend ways in which the workplace can act to create a good learning environment will determine how effective the team will be.

Collecting basic workplace information

Collecting detailed basic information about the workplace is the first task for the team. Sharing and combining the information from team members will enable a complete picture of the organisation to be built up.

Working through the next set of questionnaires will build up the picture.

In some workplaces the questionnaire may appear either too simplified or too elaborate. As always, adapt and add to the format to meet your needs. It may be appropriate to use the questionnaire as a checklist to ensure that all the required information is collected if it is not already easily available.

It is important that all members of the team are in possession of the same set of facts about their workplace. Working through these questionnaires will help them to become used to working as an effective team. The process models good adult education practice and develops the research skills of team members as they collect, compare and collate information.

This information then provides the base from which recommendations about future activity and priorities can be made, agreed and communicated throughout the workplace.

Basic workplace information 1

Workplace name

Is it all on one site?

Address(es)

Major activity/core business

Are there other important activities?

Do different sites carry out different parts of the activity? If so, list them.

Site Activities

Site Activities

Site Activities

Basic workplace information 2

Major union(s)

Does the workplace have a training agreement with the major union(s)?
- If yes, list the main points of the agreement.

Major award(s)

Are agreements about access to training part of the award?
- If yes, what are the key undertakings?

Do you have an enterprise industrial agreement?

If so, in what areas does it differ from the major awards in your industry, especially with regard to training?

How is your organisation structured?

e.g. Manager
Deputy manager(s) – professional staff
Technical Staff – supervisors
Production workers

Draw a map of the organisation as you understand it. Attach if space is insufficient.

Basic workplace information 3

Number of employees

Using the map and titles appropriate to your organisation, approximate the number of employees (male and female) at each level.

Manager	male	female
Production workers		
totals		

Does the workplace operate shifts:
Describe the shift structure, e.g. 2 shifts, rotating etc.

How are the employee numbers distributed?

Not involved in shifts

Day shift

Afternoon shift

Night shift

Rotating shift

When you consider the information gathered in **Basic workplace information 1-3**, some implications for change may already be obvious.

For example:

- operating on more than one site can make access to training difficult for some workers;
- a complex shift structure may also mean that some workers have less access;
- an organisational structure that does not place the training function centrally may indicate that training is not seen as vital to the organisation's success.

These indicators will help to shape any plans you make for change.

Current learning/ training practices

Collecting information about current learning and training programs is also necessary to establish the base from which change strategies can be developed.

When identifying workplace learning it is important to think about the many ways in which learning can take place. Some of the most valuable are informal and these may be unrecognised and unrewarded. Utilising the skills of employees as trainers, role models or mentors, and providing training in a variety of styles and formats will maximise opportunities and ensure that everyone has access to the type of program that suits their preferred learning style.

In this context, and throughout the manual, learning is used to describe the wide variety of activities through which people learn and practise new skills and acquire knowledge. Learning programs can include such activities as coaching or mentoring, job rotation and individual development programs, as well as more formal training.

Training is used to describe the subset of learning that can be characterised as formal. Training, as used here, ranges from traditional classroom programs to the open learning, self-paced and modularised programs currently being developed and accredited in many industries.

It may be delivered by trainers in the workplace or by an external provider either in the workplace or outside it.

Training is frequently competency based and formally accredited.

Part 2 contains further information about how to identify learning opportunities and build them, in addition to training, into a complete learning structure.

The following set of questionnaires will help you to identify the main forms of learning current in your workplace. It will also make clear whether all the different types of learning are recognised, valued and integrated into a complete program; or whether some types of activity are emphasised and others overlooked.

The section **Taking a broad view of training/learning** in Part expands on the need for incorporating all kinds of learning experiences into a workplace program.

Current workplace learning 1

What types of learning/training programs currently take place in your workplace?

Certificated training

- delivered outside the workplace ☐
- delivered in the workplace by an external provider ☐
- delivered in the workplace by own training staff ☐

Non-certificated training

- delivered outside the workplace ☐
- delivered in the workplace by an external provider ☐
- delivered in the workplace by own training staff ☐

On-the-job learning such as

- job rotation ☐
- supervised projects ☐
- shadowing ☐
- observation ☐
- supervised activity ☐
- other ☐

_____

_____

_____

Mentoring ☐

Coaching ☐

1:1 support ☐

Learning syndicates or small groups ☐

Study leave for externally provided courses

What form does this take? ☐

- leave for university or technical courses ☐
- block releases for apprenticeship or other training ☐
- exam leave only ☐
- other

_____

_____

Other learning/training programs

_____

_____

_____

_____

Further explanation of a variety of learning opportunities and how they can be structured in a workplace occurs in Part 2.

The second questionnaire in this set explores the priorities placed on different types of learning in your workplace.

Current workplace learning 2

Which is the major type of learning activity?

Are some types of learning recognised, valued or rewarded better than others?

Do all sections of the workforce have similar levels of access to learning?

If not, who determines who gets what?

Is the bulk of the learning effort for new workers?

Do workers have continuing access to retraining, refresher courses or skill up-grading or extension courses?

Are there clear priorities about who should have access to learning/ training?

If so, who decided these?

Are experienced workers used as trainers, coaches or mentors, or in peer tutoring roles in the workplace?

If so, how are they trained and/or supported?

Is their work recognised? How?

Are learning outcomes measured? How? For all types of learning activity?

Is learning achievement (skills acquired and demonstrated) recognised through

- pay increments?

- other formal or informal acknowledgement?

- promotion?

- access to further training?

- other means?

You will now have a picture of the kinds of learning and training that are available in your workplace.

You may have found, for example,

- only formal classroom based training is provided or recognised;
- training is only available for certain groups of workers;
- the skill and experience of workers is not recognised and used in training others.

Your discoveries here will help you in designing a more broadly based program.

Personal experience of learning

The next questionnaire encourages each member of your team to explore his or her own experiences of, and attitudes to, learning and training. These may vary widely between team members, and this variation may indicate that some people in the workplace are barred from what they perceive as successful participation in learning programs because of the content or the delivery mode of those programs.

You may discover that some workers will not participate in the learning programs offered because they do not provide skills that are relevant to their jobs or because they do not give them access to higher classification or salary increments.

Learning experiences that are generally seen by team members as valuable can form a starting point for redesign of the learning program. Conversely, experiences that are not valued or not considered useful will give an indication that learning needs are not being met and that effort is being spent on unprofitable activity. Changing the balance of the types of learning experiences offered may be indicated.

Current workplace learning 3

What is your personal experience of learning in the workplace?

- what form did it take?

- was it an effective/appropriate process?

- did you learn what you wanted to learn?

- have you had opportunities to apply that learning in your job?

- was that learning recognised in some way? How?

- are there other learning opportunities you would want?

- how would you go about arranging for them to happen?

What is your personal experience of undertaking training in this workplace? Describe.

Who decided that you should undertake this training?

How can you gain access to training that you feel is relevant?

Have you had the opportunity to discuss your learning needs with your manager/supervisor?

Have you developed your own learning goals?

Is there an established process by which you are offered opportunities to reach these goals?

Before completing the next questionnaire, **Current workplace learning 4,** it is useful to review the way in which the terms of **learning** and **training** are used in this manual.

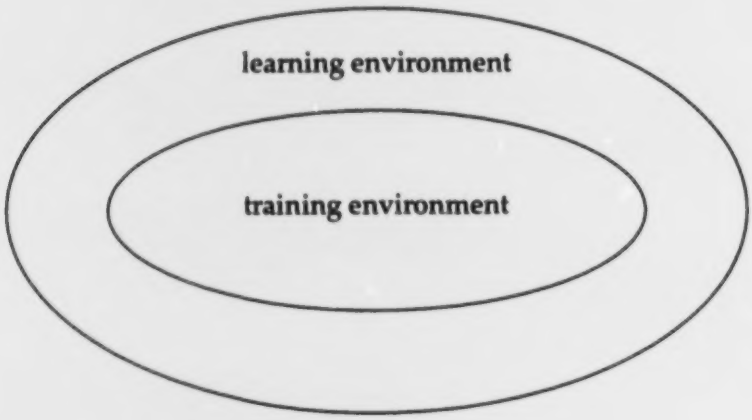
The following quote may help to clarify the distinction:

Training usually refers to short term activities that emphasise practical skills immediately applicable to the job.

Learning takes place through daily interaction and experience within the organisation whether or not it has been structured by trainers. It is often self-directed and self-monitored and includes informal modes such as coaching, monitoring and working groups focused around a specific task.

– Learning in the Workplace, V J Marsick

In diagrammatic form this can be represented as:



In a learning environment, all the ways in which learning can take place are recognised. The skills of experienced workers are fully utilised by involving them in designing and implementing learning programs of many kinds.

Current workplace learning 4

Would you class your workplace as

- ☐ a training environment?
- ☐ a learning environment?
- ☐ providing and recognising formal training?
- ☐ providing and recognising a wide range of formal and informal learning opportunities?

Do you believe that this workplace could (and should) take steps to move from a training environment to a learning environment?

If so, in what ways should the environment be different?

What steps do you think should be taken to change it?

What is the first step?

What is the most important step?

What is the most potentially difficult step?

Do you need other allies?

How can you involve them in your plans?

This group of questionnaires has provided information about what is considered valuable in your workplace, what is rewarded or recognised in some way and where major attention is focussed.

It has also identified missed opportunities, unused skills and experience and, perhaps, wasted effort in the form of programs poorly designed or not integrated with the achievements of the workplace's learning goals.

The last two questionnaires in this part of the manual will establish the framework in which policy on learning and training is located in your workplace. They also allow you to identify other change processes that may be taking place.

With this information you and your team of allies will be in a position to closely examine what is currently happening and to establish priorities and make recommendations for future action.

Workplace policies 1

Does the organisation have a corporate vision or mission statement? If so, what is it?

How was it developed?

Who was involved?

Is there a regular update/review process?

Is there a process to encourage the commitment of all staff to the vision?

Are there accompanying goals and strategies?

Who is involved in developing/reviewing these?

What areas of activity do they cover?

Is this workplace involved in a Total Quality Management program or similar process? Describe.

Has this required organisational restructure, jobs redesign etc?

Is training (retraining) a part of this process?

Are consultative processes used? What type?

- standing tripartite committees

- ad hoc committees

- regular team meetings

- other

What are these consultative processes used for?

(e.g. training, restructuring, jobs redesign, occupational health and safety)

Can they be used for changing the learning environment?

Workplace policies 2

Are workplace learning (or training) goals contained in your vision statement, corporate goals and/or business plan?

Are the learning/training goals based on a detailed analysis of the skills, knowledge and attributes required in the workplace?

How does the workplace decide policy on how learning should happen?

- ☐ as part of the overall policy development?
- ☐ as a separate process?
- ☐ on an ad hoc basis or to solve specific problems?
- ☐ as part of a human resources development plan?
- ☐ other

Who is involved in developing learning policy?

- ☐ a training committee?
- ☐ a tripartite consultative committee which also has responsibility for other decisions or recommendations?
- ☐ are other people/groups consulted?

Do individuals have personal development or learning plans?

Do managers/supervisors have responsibility for ensuring that their staff have access to learning opportunities?

How is the size of the total training/learning budget determined?

- ☐ to meet learning goals as discussed above?
- ☐ to meet requirements of the Training Guarantee Act?
- ☐ other

_____

_____

How is access to the learning budget determined?

- ☐ departments have an entitlement?
- ☐ individuals have an entitlement?
- ☐ by submission?
- ☐ by allocation through budget development process?
- ☐ other

_____

_____

_____

Summing up

You and your team now have, at your finger tips, a large amount of information about your organisation, how it operates, what change processes it is currently engaged in and where learning or training fits into its overall strategies and goals. This information may be sufficient for you to identify the ways in which the learning environment can be altered to make it more accessible, more inclusive and more effective.

The next stage of the process of transforming the workplace must be to seek and receive endorsement of the need for change. The size, nature and current state of the workplace will determine the way in which any change is promoted and managed. In Part 2 a framework for transforming your workplace is outlined and some further reading is suggested.

The major purpose of Part 2 is to discuss in detail each of the key characteristics identified in the Introduction, and to suggest ways in which workplace teams can design and implement programs that will assist them to create an effective learning environment.

Part 2
Key characteristics of a learning environment

- Introduction
- Building a shared vision
- Encouraging participation
- Taking a broad view of learning/ training
- Working from the ground up
  - developing individual learning plans
- Identifying skills and developing learning plans
- Recognising and using mentoring
- Recognising and rewarding learning
- Allowing risk taking

Part 2
Key characteristics of a learning environment

Introduction

In *The Learning Company – a strategy for sustainable development*, Mike Pedler, John Burgoyne and Tom Boydell point out that there 'are a number of different starting points for pursuing a Learning Company strategy within your company'. They list ten different starting points and stress that these are not mutually exclusive. Starting in several different places at the same time may be appropriate in some workplaces.

These starting points are quoted in full as they provide clear guidelines for further action.

[from *The Learning Company*, M Pedler, J Burgoyne & T Boydell, McGraw-Hill, London, 1991, pp 50-51]

' **Work with the board of directors** In some ways the obvious place to start. Sooner or later these people will have to support and live out the idea in their actions and learning if it is to spread throughout the company. If these people begin to practise the ideas upon themselves and with those with whom they come into contact, then it will have a most powerful effect.

Work out from the human resources department This starting place has the advantage of being where the people management systems are located. For example, if there is a goal setting and performance review process then the ideas of the Learning Company can be linked into this. People in this function may be relatively knowledgeable about ideas of learning and development. This may help but it may also block a Learning Company initiative.

A joint union and management initiative In some organizations there is great potential for development in an alliance of managers and trade unionists, working from their respective concerns to challenge and transform existing assumptions and methods of working. As the way we think about organizing becomes more and more crucial to productivity and wellbeing, so temporary partnerships of old adversaries can often serve to break up old positions and thinking. Any Learning Company initiative in a unionised company must, sooner or later, confront this question of partnership and, rather like human resources departments, trade unions have great potential for supporting *and* for blocking.

[from *The Learning Company, op. cit.*]

' Set up a series of task forces Perhaps task forces could be set up to look at a number of the dimensions of the Learning Company that you wish to pursue. Task forces can function like action learning groups and should have sponsors that they are accountable to and perhaps advisors who can support their work. There could be a 'meta' task force charged with overseeing the whole Learning Company process. As temporary structures, task forces do not threaten the existing power distribution too much and can mobilise large amounts of energy and creativity. Equally they should dissolve themselves when they have accomplished their goals or when the resistance forces have stopped forward progress.

Run a consciousness-raising development program In seeking to 'change their cultures' many organizations have mounted large campaigns that have included significant training courses to get across the message of, for example putting customers first or quality means getting it right every time. This approach must have the Board behind it and can be very effective in the short term for raising energy and expectations. Problems usually occur with the question of what to do afterwards and such an approach needs to be part of a grander strategy?

Work with the strategic planning cycle In organizations where there is a strong commitment to a cyclical planning process, this might prove to be the right point to attach a Learning Company orientation. The link between planning and learning and the trick of how to look upon planning as learning are crucial factors here. Potentially, the planning process represents a central pivot of organizing on which all members could have a say and make a contribution.

Begin with diagnosis All good organization development interventions begin with data collection, analysis and diagnosis. Our Learning Company profile included in this book is one way of collecting data. We are currently developing a longer, computer-analysed version.

However, a word of warning – paralysis by analysis is all too common in such approaches and calling for more data is a favourite tactic of the status quo merchants. Another problem is that of being swamped by data because you didn't think carefully and selectively enough about what information to collect. Our inclination is to commission an action learning process that includes the gathering of data as part of taking action and learning from it, and not to split the essential wholeness that is thinking and doing.

Start with a community conference or teach in One way to involve representatives of the whole company in an initial thinking or 'tasting' exercise is to design a conference to introduce people to the idea and to involve them by asking for their opinions about the directions the company should be going in and what problems they foresee in meeting targets and plans. Such conferences can be relatively inexpensive, small steps that none the less produce a lot of enthusiasm and ideas.

[from *The Learning Company, op. cit.*]

' However, they can suffer from the shortcomings of other 'consciousness raising' approaches unless you have a good commitment to going further.

Start with one department There is no reason why one department should not make a start on the Learning Company process by itself. Supposing the accounts department began to adopt this approach. If they succeeded in changing themselves and the way they worked together then they would eventually 'export' this to the rest of the organization. For example, perhaps there would be a different way of presenting accounts and a different approach to accounting responsibility, together with a new service to internal customers from the department. Obviously there are limits to how far this could go without broader implications, but this could be a very practical place to make a beginning.

Major on one of the key dimensions A company that wished to follow a Learning Company strategy could start by working on one of the dimensions and forget about the others for the time being. For example, the development of a high-quality learning climate or perhaps the spread of information, ideas, technology and software throughout the organization might make good starting places in particular companies. As we have stressed before, our model is only *our* picture of it at this time; it may be a different picture for you and it will certainly change over time. The place to start is, where it makes most sense to do so – although always with the idea, the big picture, at the back of your mind.

The next seven sections, each dealing with one of the key characteristics, also provide a series of different starting points.

Building a shared vision

Before any planned major changes can occur in an organisation there must be agreement about both the need for change and the best direction in which to go.

Creating this 'shared vision' is the critical first process of creating a good learning environment.

The 'shared vision' may be about

- making greater profits
- making people's jobs more satisfying and challenging
- making the enterprise's products better, more cheaply and in larger quantities
- redesigning jobs and plant or office layouts so that work is easier and more efficient
- providing training that enables workers to learn new skills and employers to deploy those skills more flexibly
- recognising the skills of workers and utilising them well

- involving people in making the decisions that affect their working lives.

Ideally a shared vision for an organisation will include most or all of these possibilities.

The processes of establishing a shared vision will also develop skills that may be used in many ways to the benefit of the organisation and its members.

Building a shared vision takes time and commitment to involving other people in an active inquiry into the future the organisation seeks to create.

A shared vision cannot be imposed, coerced or bought. It does not spring from one person sitting and writing alone or from taking a group of senior executives away for a planning session, although these are common and useful starting points. Equally, it cannot come from any non-representative group of employees taking for themselves the role of defining the vision for their workplace.

At some stage, and preferably from the beginning, **all** employees should be given the opportunity to participate in the process. If people are involved, directly or through their representatives, in the development of a shared vision they are more likely to commit their energy towards achieving that vision.

In *The Fifth Discipline – the Art and Practice of the Learning Organisation*, Peter Senge identifies seven possible attitudes towards a vision. These range from commitment to apathy, and Senge asserts that a shared vision can only become the driving force for an organisation when the majority of employees are committed or enrolled.

Possible attitudes towards a vision

Commitment
Wants it – will make it happen.
Creates whatever 'laws' (structures) are needed.

Enrolment
Wants it – will do whatever can be done within the 'spirit of the law'.

Genuine compliance
Sees the benefits of the vision.
Does everything expected and more.
Follows the 'letter of the law' – 'good soldier'.

Formal compliance
On the whole, sees the benefits of the vision.
Does what is expected and no more.
'Pretty good soldier'.

Grudging compliance
Does not see benefits of the vision.
But, also, does not want to lose job.
Does enough of what's expected because he/she has to, but also lets it be known that he /she is not really on board.

Non-compliance

Does not see the benefits of the vision and will not do what is expected. 'I won't do it. You can't make me'.

Apathy

Neither for nor against vision. No interest. No energy. 'Is it five o'clock yet?'

– The Fifth Discipline, The Art and Practice of the Learning Organisation, Peter M Senge

Designing a process that will allow every member of an organisation to participate in the process of developing and endorsing a shared vision will depend on the size and structure of the organisation.

In a large organisation the process of developing a vision may need to be delegated to representatives of all groups. These representatives must be given opportunities to discuss the process at all stages, to obtain feedback from those they represent and to pass on any concerns. Methods such as Search Conferences can be used to allow such representative groups to make effective decisions in the present by taking account of likely future trends and current constraints. Also useful is the Delphi technique in which individuals pool their written responses to a carefully posed question. The responses are collected and circulated. Each person then assesses the relative importance of each and perhaps adds to them. The process is repeated until consensus is reached.

Some workplaces may decide to seek the advice of consultants with experience in assisting organisations to identify their corporate goals and develop a shared vision.

The following exercise outlines a process for building a shared vision which may be suitable for a small organisation.

Exercise: Building a shared vision

The planning stage

- Arrange for all staff to take a break together.
- Organise a sympathetic facilitator.
- Distribute information about the purpose of the day and what you wish to achieve.
- Give people plenty of time beforehand to clarify their own vision of what the organisation could be – ask them to write it down in a limited number of words.
- Provide a pleasant, harmonious atmosphere.

On the day

1 **Ask participants to**

- choose a partner;
- go to a quiet place and explain their vision to each other;
- make separate lists of commonalities and differences;
- draft a new combined vision statement using the commonalities.

2 **Swap partners and**

- explain combined vision to new partner;
- discuss and write new common vision;
- list differences separately.

3 **Repeat process until**

- everyone has talked to every other person;
- convergence has been largely achieved (if it is obvious that this won't happen, call a halt – see Item 7 below).

4 **Call a break and do something pleasant** (eat, walk, etc)

5 **Ask people to reflect individually on any remaining differences and discard those that they do not still regard as important**

6 **Plenary session**

- Display version(s) of common vision.
- Seek responses insisting on positive feedback first.
- Have you got a shared vision?
- Ask participants if they feel commitment to the shared vision and are willing to let go of their remaining differences (if any).

If the answer is **yes**

- congratulate yourselves and celebrate.

If the answer is **no**

- seek dissenting voices – offer every participant the opportunity to lay out and explain their differences briefly;
- don't allow comment or argument – just list.

7 If there is no shared vision or the differences are still major the group may decide to

- call a halt and, after a period of reflection, reconvene in small group discussion or negotiation. (Then set a time for discussion – are the differences major? – can they be removed by change of wording or emphasis?,

  or

- seek consensus on parts of the vision. It may be possible to separate out contentious or non-agreed areas and reach agreement on a 'smaller' vision which will still provide common ground which people feel committed to

  or

- decide that it is too hard at present and agree to concentrate on such activities as

  – building task-oriented teams;

  – developing communication/team skills;

  – reviewing existing training/learning programs.

Remember

A shared vision must lead to goals and strategies that are agreed by the participants. It needs to be worked so that it is

- examined regularly;
- refined /adapted when necessary;
- introduced to new staff seeking their commitment.

Encouraging participation

The development of an effective workplace learning environment appears to go hand-in-hand with the development of a flatter management structure which focusses on operating through self managing teams and on involving employees in planning and implementing change. In such an environment workplace teams will be involved in identifying the skills required by their part of the organisation, and it is a small but logical extension to also involve them in designing and perhaps providing the learning programs designed to ensure that employees acquire these skills.

Such restructures also focus attention on the need for involving employees at all levels in learning new skills in areas such as team building, communication and problem solving.

Where tripartite consultative committees or other employee participation mechanisms exist, planning learning programs can become an added responsibility. In Australian workplaces unions have supported the right of the members to have access to education. In many enterprise agreements, provision of training is recognised as central to meeting the restructuring goals of the enterprise. An established training committee can re-focus itself to look more broadly at a wider range of learning opportunities. They might investigate the possibility of setting up a mentoring scheme or of arranging for job rotations and secondments so that new skills are learnt on the job.

Such committees must be involved in their own learning program. This can be done by scheduling regular sessions on such topics as adult learning principles, uses of technology in education and innovative learning programs in other organisations. Most importantly they need to receive regular feedback on their own learning and training initiatives and develop criteria for evaluating such programs.

It is important that all sections of the workforce are represented on such committees, that they are empowered to deal with real training needs and that the learning or training programs that they recommend are included in the organisation's strategic planning.

In workplaces without an existing training committee, the process of encouraging workers to identify learning needs can commence with a series of simple meetings. These will allow work team groups to decide how they will analyse specific training needs, identify resources and plan an appropriate training program.

Holding such meetings is a learning process in itself, and some groups may need support as they learn how to conduct a meeting effectively.

There are many texts available on meeting procedures. The following brief outline may be useful.

Holding a training needs meeting

Preparation

A small group may need to meet to

- draw up the agenda for the meeting;
- book meeting space;
- send notice of meeting and agenda to participants;
- decide who will chair the meeting and confirm that any speakers or presenters are aware of their role and are available.

Typical agenda

A typical agenda for the first meeting could be:

Agenda

1. Welcome and introduction of members

   (This could be done informally by a 'go-around' – asking each person to identify themselves, state who they represent and what they hope to contribute to and get from the meeting.)

2. Training needs of the workplace

   (Providing this type of background information could be done by a speaker or by circulating information before the meeting.)

3. Discussion of workplace training needs and of the role of the committee

   (In this part of the meeting the group may need to discuss and reach agreement on such issues as
   - *area of responsibility*
   - *relationship to other committees*
   - *reporting and/or recommending role of the committee*
   - *mechanisms for gaining information from and giving feedback to the groups that committee members represent etc.)*

4. Team training needs

   (At this first meeting the main task would be to agree on
   - *what process will be used to analyse training needs*
   - *who will take responsibility for particular tasks*
   - *whether other expertise is needed and where it can be obtained.)*

5. Next meeting

   (This section should include setting the date and confirming what action needs to be taken before the next meeting and who will take it.)

Successive meetings

These will need to

- receive and discuss the results of the training needs analysis;
- prioritise the identified needs;
- establish a process for identifying the learning needs of individuals;
- make decisions about how the needs can best be met;
- collect information about existing training options and their relevance;
- discuss internal resources and how they might be used;
- plan the training program.

Similar meetings can also be held, using representatives from various team committees, to combine the different plans that arise from the initial team discussions. A balanced program will take into account the needs of all departments or sections of the workforce and will ensure that access to training is equitably distributed.

Moving from planning training to planning learning is discussed in more detail in the following section.

Allowing everyone to complete their own development or learning plan is one way of identifying

- learning/training needs
- skills not being used effectively
- potential trainers/coaches or mentors
- opportunities for structured on-the-job training.

Taking a broad view of learning/training

What is learning in your workplace?

Learning can take many forms and is often very different from what we remember happening in a classroom at school.

Designing learning programs for adults means taking into account knowledge about the ways in which adults learn best. This is well summed up by S D Brookfield in a paper entitled *A Critical Definition of Adult Education* (reprinted in Watkins 1991). The six principles he derives can be summarised as follows.

1. Participation is voluntary – the decision to learn is the learner's.
2. Respect for self worth – criticism may be present but an increasing sense of self worth underlies all educational efforts.
3. Adult education is collaborative – teachers and learners are engaged in a co-operative exercise in which each at different times may assume the role of leader or facilitator.
4. Participants are engaged – a constant process of activity, reflection, collaborative analysis, new activity and so on.

5. Adult education fosters a spirit of critical reflection.
6. The aim is the nurturing of self-directed, empowered adults.

Looking at these principles as they might operate in the workplace it is clear that many kinds of activity may be used to create learning opportunities.

Well designed training programs will use adult learning principles to ensure that students reach their potential.

An effective learning environment allows for different learning styles and provides a wide range of opportunities so that everyone has access to the type of program that suits them.

Learners are usually divided into four main groups with different learning styles. Most people keep to their preferred style although some are happy with more than one.

The learning styles are generally described as:

- auditory – learn best by hearing and discussing
- visual – need to look and read
- kinaesthetic – want to touch and physically practise skills
- mixed – prefer a mix of all three.

Competent teachers will employ a variety of techniques to ensure that all learning styles are catered for. They will seek feedback from their students and provide a wide range of experiences.

Choosing the right location and mode of delivery can also affect the outcome of programs. Training rooms, open learning centres and the factory floor can all be used to good effect.

TAFE colleges and other providers of training have an important part to play in many workplace learning programs, often designing or adapting curriculum in partnership with workplace trainers. Programs may be delivered jointly or by either partner.

Using the skills of experienced members of the workforce to design and deliver training and to structure learning opportunities is essential.

In a workplace which does not have experience in planning and implementing training or learning programs, it may be difficult for people to visualise the many forms that such programs may take.

A simple exercise can help identify the ways in which learning does take place and suggest other ways that could be used. It may be useful for members of the training committees referred to in the previous section.

Exercise: Identifying how learning takes place

Stage one

Working in pairs, take turns with one person asking the prompt questions listed below.

1 Think of some task you do regularly and describe how you learnt it.

2 Repeat, describing a skill you use at home *and* at work.

3 Are there skills you want to learn? What do you think would be the best way to learn them?

Some useful prompt questions –

- What did you learn?
- When did you learn it?
- Where?
- Who from?
- How?
- Did anyone check whether you had learnt it?
- How did you demonstrate that you had learnt it?

Stage two

As a group, collect all the information from the pairs. Note the types of things people learnt, the ways in which they learnt them and how they evaluated or demonstrated what they had learnt. List the ways that were selected as the best way to learn specific skills.

Stage three

Still as a group, attempt to identify learning strategies that could be used in your workplace.

This exercise will almost certainly make it obvious that people learn in different ways. For some, only hands-on activity seems effective while others are comfortable in a formal classroom or in a variety of learning situations.

This process models, in a very informal and simplified way, the process of developing an individual learning plan.

Working from the ground up – developing individual learning plans

A key characteristic of a good learning environment is that it responds to the learning/training needs of individuals as well as to the need of the workplace to have workers with particular skills.

As part of their strategic planning, many workplaces have undertaken extensive investigations into the skills and competencies required by their organisation. To fully use this information and to design an appropriate learning program it is essential that the learning needs of employees are also analysed.

In addition, as jobs change through multi-skilling and the introduction of new technology and quality control processes, workers themselves need to become increasingly aware of the underlying skills that they possess which they could also use in new situations as their workplace is restructured or as new technologies are introduced. These are variously referred to as core skills, key competencies or transferable skills.

The skills and learning needs examined in this process must include transferable skills such as planning and organising activities and working with others and in teams. Many workers find these skills difficult to understand and identify, although they are easily able to identify the technical skills related to their jobs.

Managers should facilitate the development of analytical skills in their workers so that they are able to participate fully in the processes of identifying their learning needs and developing their individual learning plans. The processes suggested here are based on those developed and extensively tested by the Work Based Learning Team in the United Kingdom.

In Australia, the 1991 publication of *Young People's Participation in Post-Compulsory Education and Training* (known as the Finn Report) focused attention on the need to change the way in which young people were prepared for the transition from school to work. It recommended that work continue on the development of 'employment-related Key Competencies', the Australian equivalent to the U K Core Skills. The 1992 publication *Putting General Education to Work* presents the result of this period of research and consultation.

Subsequent consultations led to the refined proposal contained in *Putting General Education to Work* (Mayer 1992). The seven key competencies are quoted below. They were developed to describe the competencies required by young people as they leave school and move into work or vocational training. However, they are equally applicable to all workers who must adapt and learn new skills in a changing workplace.

Key Competencies

for effective participation in the emerging forms of work and work organisation.

Collecting, analysing and organising information

The capacity to locate information, sift and sort information in order to select what is required and present it in a useful way, and evaluate both the information itself and the sources and methods used to obtain it.

Communicating ideas and information

The capacity to communicate effectively with others using the range of spoken, written, graphic and other non-verbal means of expression.

Planning and organising activities

The capacity to plan and organise one's own work activities, including making good use of time and resources, sorting out priorities and monitoring one's own performance.

Working with others and in teams

The capacity to interact effectively with other people both on a one-to-one basis and in groups, including understanding and responding to the needs of a client and working effectively as a member of a team to achieve a shared goal.

Using mathematical ideas and techniques

The capacity to use concepts such as number, space and measurement and techniques such as estimation – for practical purposes.

Solving problems

The capacity to apply problem-solving strategies in purposeful ways, both in situations where the problem and the desired solution are clearly evident and in situations requiring critical thinking and a creative approach to achieve an outcome.

Using technology

The capacity to apply technology, combining the physical and sensory skills needed to operate equipment with the understanding of scientific and technological principles needed to explore and adapt systems.

– Mayer 1992

The Key Competencies are similar to developments in other countries, including the United Kingdom where research has led to the identification of nine Core Skills. The comparison table below shows that each of the U K Core Skills, with the exception of modern foreign language, is similar to one of the Australian Key Competencies.

Key Competencies	UK Core Skills
• Collecting, analysing and organising information	• Communication
• Communicating ideas and information	• Communication • Personal skills: improving own learning and performance
• Planning and organising activities	• Personal skills: improving own learning and performance
• Working with others in a team	• Personal skills: working with others
• Using mathematical ideas and techniques	• Numeracy: application of number
• Solving problems	• Problem solving
• Using technology	• Information technology
	• Modern foreign language

Within the Key Competencies three performance levels are described:

Performance Level 1 describes the competencies needed to undertake activities efficiently and with sufficient self-management to meet the explicit requirements of the activity and to make judgements about quality of outcome against established criteria.

Performance Level 2 describes the competencies needed to manage activities requiring the selection, application and integration of a number of elements, and to select from established criteria to judge quality of process and outcome.

Performance Level 3 describes the competencies needed to evaluate and reshape processes, to establish and use principles in order to determine appropriate ways of approaching activities, and to establish criteria for judging quality of process and outcome.

The Committee believes that these levels capture the range of competencies required for successful participation in work at entry level and that Performance Level 3 is challenging but should be attainable by most young people.

– *Putting General Education to Work* 1992

The Key Competencies are scheduled for implementation in 1995. In the meantime a program of field testing and the production of a training and development package is under way.

Identifying skills and developing learning plans

To enable workers to identify their core skills or key competencies a set of tools has been developed by Margaret Levy of the Work Based Learning Project (WBL) in the United Kingdom. They are quoted here with her permission.

These tools, the Core Skills List, the Flow Chart for Core Analysis and the Individual Learning Plan, can be used together to provide all the information required by workers to identify their learning needs and by a workplace to design a flexible, responsive learning program.

Finding a common language for identifying and talking about the underlying skills is often difficult. The Work Based Learning Project (WBL) in the UK has produced and extensively trialled a list of 103 core skills which they describe as 'those skills which are common in a wide range of tasks and which are essential for competence in those tasks'.

Core Skills List

This list was developed **not as a scale** but as a set of statements to assist with a variety of activities related to job design and the planning of training. Each statement should be placed in context by clarifying how the core skill is used.

e.g. Plan the arrangement of items
by structuring the annual report clearly and logically,

or *by comparing the 'use by' date on perishable goods to place them on the shelves in the correct order.*

According to the UK WBL Project the Core Skills List can:

- *provide a new language of skill for describing occupational competence;*
- *assist with the accreditation of work based learning;*
- *assist with the design of work based learning through VET [vocational education and training];*
- *develop learners' awareness of transferable skills and their own ability to use them to tackle new tasks;*
- *provide approaches in VET which encourage autonomy of learning and develop personal effectiveness;*
- *assist selection by providing a broader base of information for selectors in employment and further and higher education;*
- *assist with workplace analysis to identify the competencies required by an individual worker in a specific workplace;*
- *assist with the diagnosis of individual workers' training needs.*

In the UK, the Core Skills are used in a wide variety of situations, by factory floor workers as well as senior executives. They underlie the technical or other skills commonly thought of as the total skills possessed by an individual.

They are arranged in four areas – number, communication, problem solving and practical, and these are further subdivided into 14 skill groups.

Core Skills: The four areas

Number

operating with numbers

interpreting numerical and related information

estimating

measuring and marking out

recognising cost and value

Communication

finding out information and interpreting instructions

providing information

working with people

Problem solving

planning: determining and revising course of action

decision making: choosing between alternatives

monitoring: keeping track of progress and checking

Practical

preparing for a practical activity

carrying out a practical activity

finishing off a practical activity

The Core Skills: Quick reference list

Number

1 Operating with numbers

1.1 Count items singly or in batches

1.2 Work out numerical information

1.3 Check and correct numerical information

1.4 Compare numerical information from different sources

1.5 Work out the cost of goods and services

2 Interpreting numerical and related information

2.1 Interpret numerical data or symbols in written or printed form

2.2 Interpret diagrams and pictorial representations

2.3 Interpret scales, dials and digital readouts

2.4 Identify items by interpreting number colour, letter codes or symbols

2.5 Locate places by interpreting number, colour or letter systems

3 Estimating

3.1 Estimate quantity of observed items or materials

3.2 Estimate quantities for a process

3.3 Estimate portions or shares

3.4 Estimate dimensions of an observed object or structure

3.5 Estimate weight, volume or other properties

3.6 Estimate the time needed for an activity

3.7 Estimate the time an activity has been going on

3.8 Estimate the rate of use of items or materials

3.9 Estimate the cost of goods and services

3.10 Estimate and compare shapes or angles

3.11 Estimate the size of gaps or holes and the fit of items

3.12 Estimate required sizes of containers or covering materials

3.13 Estimate size or shape for the purpose of sorting

3.14 Estimate settings for tools, equipment, machinery

4 Measuring and marking out

4.1 Measure the dimensions or an object or structure

4.2 Mark out required dimensions and shape

4.3 Measure weight, volume or other properties

4.4 Measure out a required weight or volume

4.5 Measure the time a process or activity takes

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5 Recognising cost and value

5.1 Compare the cost of different goods and services

5.2 Compare the relative costs and benefits of buying or using goods and services

5.3 Recognise the value of items in order to take appropriate care of them

Communication

6 Finding out information and interpreting instructions

6.1 Find out information by speaking to other people

6.2 Find out information from written sources

6.3 Find out information by observing

6.4 Interpret spoken instructions

6.5 Interpret written instructions

6.6 Find out the needs of other people in the workplace

6.7 Find out the facts about things that have gone wrong

6.8 Find out the needs of customers and clients

7 Providing information

7.1 Provide information by speaking to other people in the workplace

7.2 Provide information by speaking to customers and clients

7.3 Provide information in writing and by means of tables and diagrams

7.4 Provide information by demonstrating to other people

7.5 Provide information by answering questions in the course of the job

7.6 Provide information by explaining to others problems that have occurred in the job

8 Working with people

8.1 Notice when to ask other people in the workplace for assistance

8.2 Ask other people in the workplace for assistance

8.3 Notice the needs of customers, clients and other people in the workplace

8.4 Offer assistance to other people in the workplace

8.5 React appropriately to requests from other people in the workplace

8.6 Discuss with other people in the workplace how things are to be done

8.7 React appropriately to complaints from other people in the workplace

8.8 Offer assistance to customers and clients

8.9 React appropriately to requests from customers and clients

8.10 Converse with customers and clients in order to establish or maintain an appropriate relationship

8.11 React appropriately to complaints from customers and clients

8.12 Notice where people behave exceptionally and whether action is required

Problem solving

9 Planning: determining and revising courses of action

9.1 Plan the order of activities

9.2 Plan who does what and when

9.3 Plan tools, equipment, machinery and stock and materials needed for a task

9.4 Plan the arrangement of items

9.5 Plan how to communicate for a particular purpose

9.6 Plan how to present information

9.7 Plan how to find information

9.8 Diagnose a fault

9.9 Plan how to deal with hazards and difficulties that might arise

9.10 Plan how to deal with things that have gone wrong

10 Decision making: choosing between alternatives

10.1 Decide when action is required

10.2 Decide which category something belongs to

10.3 Decide between alternative courses of action

10.4 Decide how to make the best of an awkward situation

10.5 Decide on a correct response when accidents or emergencies occur

11 Monitoring: keeping track of progress and checking

11.1 Check that he/she is performing a task to standard

11.2 Monitor a process or activity

11.3 Monitor the availability of stocks or materials

11.4 Check the quality and condition of equipment, materials or products

11.5 Check written information

11.6 Monitor the safety of the workplace

11.7 Notice that things have gone wrong and that action is required

Practical

12 Preparing for a practical activity

12.1 Locate the place where work is to be carried out if it is not the usual one

12.2 Identify or locate: *Tools, equipment*

12.3 Handle, lift or transport: *Machinery, materials*

12.4 Check and adjust or clean: *Stock, items*

12.5 Arrange for safe and easy working: *Animals*

12.6 Carry out start-up procedures

12.7 Adjust heating, lighting, ventilation

12.8 Check for potential hazards in the work area

12.9 Carry out health and safety procedures

13 Carrying out a practical activity

13.1 Adopt safe working practices

13.2 Lift or transport objects or materials

13.3 Manipulate objects or materials

13.4 Operate and control or adjust tools, equipment, machinery or instruments

13.5 Set up, assemble or dismantle equipment, machinery, instruments or products

13.6 Adopt safe practices in the event of accidents or emergencies

14 Finishing off a practical activity

14.1 Carry out procedures to turn off or hand over: *Tools, equipment, machinery*

14.2 Check products or results of activity for quality and accuracy

14.3 Carry out procedures for cleaning or routine maintenance

14.4 Carry out procedures to hand over products or results of activity

14.5 Carry out procedures to store or return: *Tools, equipment, machinery, stock or items, animals*

14.6 Restock for future requirements if necessary

14.7 Check for potential hazards in the work area

14.8 Carry out health and safety procedures

Using the Core Skills List to describe all the underlying skills used in carrying out a task can be a valuable way of bringing these skills into prominence.

This is especially useful when learning goals are being discussed and an individual learning plan developed.

A simple exercise will make the value of this process obvious:

Exercise: Using the Core Skills list

Stage 1

Choose a simple activity, one you do regularly at work.

Write down in the correct order all the steps you need to take to carry out this activity.

Use a flow chart format if this makes it simpler.

Stage 2

Using the Core Skills List go over the process again:

- identifying which core skills you used;

- rewriting the steps in the language of the core skills.

Example 1

Work out numerical information by collecting the required number of cups and saucers (1.2).

Example 2

Adopt safe working practices by ensuring that correct footwear and safety goggles are available (13.1).

Once workers are familiar with the use of the Core Skills List it can prove a valuable tool in analysing and describing tasks and identifying all the competencies required for the successful completion of those tasks.

For describing more complex tasks, the next tool provides a convenient framework which can also be used as part of a task analysis process.

Core analysis and the flow chart

These tools used with the Core Skills List provide a framework which allows jobs to be analysed in a way which identifies underlying skills.

As workplaces undergo fundamental restructuring they recognise that as well as increasing the technical competence of workers they need to provide learning opportunities of a new kind. New work structures require workers to work effectively as part of a team, to communicate well in a variety of situations, to take in new responsibilities for quality control and team management, and to gain analytical skills.

The new skills require that all workers actively engage in learning about their own skills and how they use them rather than simply acquiring job and occupational skills. Workers need to be able to analyse their own performance in order to improve and adapt it. A language of skill is required for this process and core analysis uses the language of the work based learning core skills to more fully describe occupational competence and the skills needed for competence in the workplace. Core analysis enables workers to interrogate their own performance and gain insight into the skills they use, and to recognise how they might apply their skills effectively to new work contexts.

– The Core Skills Project and Work Based Learning M Levy

Many competent workers are so used to carrying out the tasks required in their jobs that they find it difficult to analyse these tasks in detail. It is essential that all workers, especially those involved in on-the-job training, coaching or mentoring are able to do this so that they can identify the skills they use and see how they might use them in other contexts.

Core analysis enables a worker to identify the components of any task, first in four broad stages and then in ten detailed stages.

Four broad stages of task/activity	Ten detailed stages of task/activity	
Getting ready	provide/find out/interpret information	A
	plan	B
	prepare/organise	C
	pre-check	D
Doing it	use or interpret information	E
	measure, mark out, estimate	F
	work with people	G
	carry out task	H
Check and correct	monitor, check, find out	I
Finish off	finish off task	J

The *core analysis flow chart* can be used to simplify this process.

This flow chart consists of a series of questions, one for each component of the task.

- Each question is considered in turn.
- If the answer is **YES**, the skills used are identified and listed, using the Core Skills List. The way in which each is used is added.
- Some skills may be used in different ways at different stages of the task.

The Core Analysis Flow Chart

Stage	In the task did you have to –	Core skill number(s)	How you used the skill
A	provide/find out/interpret information		
B	plan		
C	prepare/organise		
D	pre-check		
E	use or interpret information		
F	measure, mark out, estimate		
G	work with people		
H	carry out task		
I	monitor, check, find out		
J	finish off task		

Exercise: Using the flow chart for core analysis

In pairs, take turns each acting as facilitator for the other who describes the task. Use the flow chart to analyse and describe a simple WORK task – one you do everyday without thinking about it (using the photocopier, for example). Use core skills that underlie the various activities you need to do as part of this task and work through the stages of the flow chart.

Now repeat the process, still in pairs, but this time choose a **major complex work task.** Concentrate on one particular occasion and on what you actually did (not what you should have done).

Using the flow chart to analyse tasks and identify the core skills used can also provide a lead into identifying learning needs and career path opportunities.

Using an individual learning plan

The knowledge gained by individuals through use of the Core Skills List and the Flow Chart for Core Analysis can be used by workers in the development of Individual Learning Plans.

These can then be used as the information base on which a learning/training plan for the workplace can be developed.

An individual learning plan could take the following form. It is based on the format developed by Margaret Levy and the Work Based Learning Project of the UK.

Format for an Individual Learning Plan

Section A – my current situation

Date:

Summary of my current situation regarding work, learning etc.

(full or part time jobs, school/college courses including day release or evening classes)

_____

_____

_____

_____

My other activities

(e.g. paid or unpaid responsibilities in the home and/or community)

_____

_____

_____

_____

Other things I wish to record

(which may affect my plans – e.g. how far I can travel, what hours I can work etc)

_____

_____

_____

_____

Section B – my past experience

My previous employment **Dates: from** **to**

(including part time or seasonal jobs and work experience)

My education and training **Dates: from** **to**

(including qualifications gained at school/college, at work and elsewhere)

Other qualifications and awards

Section C – my skills

Skills I have gained from my past experience and my current situation

My current situation

My other activities

My previous employment

My education and training

Section D – my future

My aims and intentions

(long term career goal(s), objectives both personal and operational, ways to progress in current employment and/or shorter term intentions)

How I can work towards my aims and intentions

(skills I need to develop, courses I should study, experience I wish to gain)

– based on Hunt 1991

Individual learning plans should be developed jointly by the worker and a facilitator who is familiar with the process and with the requirements of the position the worker holds. The facilitator will frequently be the worker's supervisor, or the training or human resources manager with responsibility for ensuring that the worker has access to the training identified as necessary to meet the needs of both the worker and the workplace.

The following exercise models the process which would be used to develop individual training plans for all employees at a workplace. It may be used to familiarise both workers and facilitators with the process and to develop the ability of both parties to use the tools effectively.

It must be emphasised that individual learning plans are most useful when the skills and competencies required in the workplace are clearly identified and where the structure of the workplace is built around a process of continuous employee development.

Exercise: Developing an individual learning plan

Stage 1 – Preparation

- provide training/familiarisation programs for supervisors or the selected facilitators
- select facilitators who have the responsibility and the power to ensure that the individual is given access to the learning opportunities identified

Stage 2 – Filling in the plan

- arrange a time for the individual to meet and discuss the meaning of the form and for the facilitator to support the individual as they both fill out the form

Stage 3 – Follow up

- identify key learning needs and possible ways of meeting them using such activities as
  - mentoring
  - job rotation/adaptation
  - internally or externally provided training
  - other appropriate activities

Stage 4 – Provision

- agree learning priorities for the following period (12 months is usual)
- decide
  - how the learning will be structured
  - what the expected outcomes will be
  - how achievement will be assessed
- arrange the necessary support and resources for the individual
  - monitor progress
  - assess achievement for the desired outcomes
  - review and plan for next period of learning

Several types of individual learning plan documents are available through industry bodies and specialist bookshops.

An interesting series of self-assessment questionnaires was developed by Helen Fitzpatrick for the Department of Employment, Education and Training in 1991. They are designed to allow office workers to identify their own skills. *The Report on the Self -Assessment Project* (1992) concluded

The self-assessment questionnaires assist clerical employees to acknowledge, reward and value their skills. The questionnaires provide an access point to career planning and progression, training directions and options and the possibility of further work-based assessment ... Importantly, self-assessment benefits both the individual and the organisations.

Self-assessment tools such as this can provide a valuable learning opportunity for the participant.

Recognising and using mentoring

Workplaces which have developed effective learning environments typically identify and use the skills and experience of the employees by involving them in training, coaching or mentoring programs.

Such programs must be set up carefully, taking into account the need for all participants to meet their own learning goals. It is important to consider personalities and preferred learning styles as well as skills and needs.

The most convenient place to start may be to establish a skills register and ask all employees whether they have skills or knowledge that they would be willing to share or teach. A skills register may be derived from individual development plans or may have been compiled following a detailed task analysis and skills audit.

Performance appraisals may also be used as a way of identifying skills of potential mentors or needs of possible protegés.

With the information base provided by a skills register and knowledge of the skills required by the workplace it is possible to design a series of specifically designed activities.

For example, technical skills may be best taught in a one-to-one or small group on-the-job training program, while team building or communication skills could be developed through a structured sequence of role playing or modelling exercises.

Mentoring systems are often incorporated into other forms of training. However they can also stand alone and may be quite informal in operation. It is important that any existing mentoring relationships be recognised and incorporated into any new learning/training structure.

The start of every workplace learning program must be to identify the skills required. This is done through a process known as task analysis.

The complementary process, that of determining the learning needs of workers, is less well understood and sometimes considered of little importance.

It is also vital that mentoring programs be regularly monitored, evaluated and reviewed. A structured process called facilitated mentoring is recommended by M Murray and M A Owen in *Beyond the Myths and Magic of Mentoring*. The facilitator is responsible for ensuring that both mentor and protegé are compatible, that goals and expectations are discussed and reviewed and that both parties receive the support they need to make the relationship productive.

In *Measures for Mentoring* Adrianne Geiger describes seven possible roles for a mentor. These are:

- communicator
- counsellor
- coach
- advisor
- broker
- referral agent
- advocate

Mentoring is commonly thought of as relating mainly to senior and junior managers or professionals. It is important to recognise that this also occurs throughout many organisations. Perhaps it is most clearly demonstrated in the factory floor or in the workshop in the relationship between an experienced, competent older worker and the new staff who are placed under his or her 'wing'.

The teaching, both formal and informal, that these people do is invaluable in every organisation. This not only includes specific skills but also vital knowledge about the culture and mores of the particular workplace or industry.

Coaching, while often seen as equivalent to mentoring, can play a different but equally valuable role in the workplace.

Experienced employees often coach the new members of their work teams, providing support and advice and supervising the practice necessary to achieve competence in the use of new skills.

Whether they are involved in on-the-job-training, mentoring or coaching, those people prepared to share/teach their skills should

- be recognised in one or more of the ways identified in the following section;
- be trained before and supported during their new role;
- be carefully matched with the people they 'train' and given the opportunity to withdraw gracefully;
- be given access to appropriate resources – equipment, space, training aids and existing curriculum material where appropriate;
- be given a specific task or role and an indication of the time they are expected to make available.

Recognising and rewarding learning

People are motivated to learn when they believe that the learning will have benefits for them. These benefits may take many forms but they need to be clearly and publicly acknowledged. The most commonly recognised form of reward is increased salary or pay, but this is not the only form of recognition that has value in the workplace. One of the most important ways of acknowledging learning occurs when workplace structures or practices change as a result.

For example, in a basic literacy class workers spent a great deal of time learning how to fill in the variety of forms required in their workplace. When it became known that all workers were now able to fill in their own forms, the supervisors were able to relinquish this task and get on with their own work. The class members were happy that their new skills were recognised and everyone had a small win.

The acquisition of new skills may be rewarded by promotion or by the opportunity to take on more interesting or challenging work.

The union movement has played a leading part in the process of restructuring awards to meet the need of enterprises for improved efficiency and greater flexibility and the need of workers for more satisfying and better paid jobs. The emphasis of award restructuring has been on multi-skilling workers and developing career paths. Training is clearly central to this process. In many workplaces skill extension programs exist in which workers accumulate points towards pay increments or classification up-grading by learning new skills and demonstrating their competence.

Public acknowledgement of learning achievements is also important, both for the individual and the enterprise.

This may take the very simple form of a public statement such as 'you did a good job there' or may be more formally given, for example through an article in an in-house publication. Some organisations reward significant achievements on honour rolls, by medal presentations or by holding special social functions.

It may be useful to encourage all workers and their unions to participate in a process to identify the best ways to recognise learning. This can be done through a series of meetings but it is essential that recommendations from these meetings are considered and incorporated into the planning processes of the workplace.

Exercise: Developing rewards for learning

Set up a team or departmental meeting following the normal procedure.

Stage 1 – Brainstorm

Write down (don't discuss) all the possible ways in which learning could be recognised in your workplace. Be as creative as you can and try to think of rewards other than money.

Stage 2 – Prioritise

Possible ways of doing this include

- individually – ask the group to decide how
- voting – Brownlow system: 3 votes for first choice
  2 votes for second choice
  1 vote for third choice
- spending – distribute $10 between choices – most money to first choice, least (or no) money to last choice

Ask someone to tally the votes or money and arrive at priorities.

Stage 3

In small groups (of two or three) discuss the top three or four priorities and devise a plan for implementation.

Try to be realistic about costs and to recognise (and extend) existing reward/recognition systems in your workplace.

Stage 4

Draft recommendations to go to management.

Allowing risk taking

Change often places people in stressful situations, and some are more comfortable with this than others. Developing a workplace learning environment is a change process and may require major shifts in people's attitudes towards their role and the roles of others. It is also, in itself, a learning process and there may be false starts, misdirected activity and temporary setbacks.

Setting up a structure that encourages and supports innovation and risk taking can serve two purposes. It signals to the workplace that these activities are valuable and it provides a forum in which ideas can be discussed, developed and implemented. The structure may take the form of a committee which meets regularly and considers innovative proposals.

The roles of this committee could include

- advertising through the workplace for suggestions and 'crazy ideas';
- assisting people to refine their ideas into a more workable form and to overcome unrealistic expectations;
- supporting proposals on a trial basis;
- arranging time release for people to explore possibilities and work up detailed proposals;
- evaluate proposals and programs in progress and at their end;
- encourage review and modification and retrial of proposals that show promise but do not achieve the desired result;
- give recognition and reward to people who take innovative or risky action, especially to those who make a good attempt but fail.

Making people, from managers to production line or service workers, comfortable with the process and willing to actively participate in it will take time and a clear shared vision. It must also be clear to all participants that failure will be tolerated and that, in fact, it can be a very positive part of the process. To prevent damage to either the individuals involved or the workplace, it is essential that any potentially risky undertakings must be manageable and agreed by all parties. Forcing people into situations where their lack of success can have dangerous consequences is futile and often counter-productive.

However when properly thought out and handled, experimentation in innovation and risk-taking can be exciting and profitable in terms of personal growth and/or reaching corporate goals.

For an organisation undergoing major change some risk-taking behaviour is essential. Proper planning can ensure that the lessons learnt from both success and failure are incorporated into future activities and structures.

Types of risk-taking that can be encouraged include –

- arranging job exchanges, secondments and other similar opportunities for people to learn and practise new skills;

- widening or narrowing job roles so that new skills can be learnt or concentrated on;
- giving additional responsibilities or setting new targets for individuals and teams on a trial basis;
- developing short term or pilot projects which focus on new or different areas of an individual or team's work;
- setting up different relationships between teams, managers and internal or external customers, for example:
  - eliminating/changing the role of supervisors
  - allowing production teams to negotiate directly with their customers
  - handing responsibility for quality control to the production teams
- using individual (or team) learning plans to identify learning and career goals which necessitate some risk-taking.

Calculated risk-taking can lead to skill enhancement and behaviour change that can, in turn, lead to improvement in the organisational structure of the workplace. It is essential that individuals or groups are not blamed for the occasional failure and that the lessons learnt from these failures are incorporated into future strategies and practices.

Summing up

The preceding pages have discussed each of the key characteristics and suggested ways in which workplaces can examine their current practice and make moves towards improving their learning environment. The scope of this book does not allow for more detailed description of how these changes can be carried out.

Among the listed references are several which provide further information and ideas which might be appropriate in some workplaces. Some may be difficult to obtain but are worth searching out in libraries and bookshops many of which will also stock other books on these topics.

Further Reading

(Fuller details will be found in the bibliography.)

Learning in the Workplace

Pedler M, Burgoyne J & Boydell T
The Learning Company

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Eitington J E
The Winning Trainer
Kiraly J & Smith C
The Sessional Trainers' Manual

Vision and the Role of Managers

Garrett B
Creating a Learning Organisation
McNeil A
The 'I' of the Hurricane
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Part 3
Research and consultation

- Introduction
- Common themes
- Overseas trends
- Australian trends
- Workplace consultations

Part 3
Research and consultation

Introduction

At the beginning of this manual brief reference was made to the research project from which it resulted. The aims of the project were to analyse Australian and international trends in the development of effective workplace learning environments; to research the theories on which they were based and, through a process of workplace consultation, discover examples of good practice. This information was then to be used to identify the key characteristics and strategies that could be used by workplaces to meet their organisational learning goals. Parts 1 and 2 are the result of this process.

Part 3 returns to the original research and consultation process and follows the path of the writer through literature search and consultation. It provides an overview and discussion of the information collected.

Workplace consultancies

Information from discussions with trainers, human resources managers and others in a number of Victorian workplaces makes it clear that many are successfully reviewing and redesigning their training programs in ways that are leading them towards the creation of a learning environment.

In this they were echoing Pedler, Boydell and Burgoyne (1989) in their definition of a Learning Company as 'an organisation which facilitates the learning of all its members and continuously transforms itself in order to meet its strategic goals.'

Each workplace was involved in a number of the processes covered in Parts 1 and 2 , each was starting in a different place and each was following a slightly different course.

Some had close and profitable relationships with consultants and expert change facilitators while others were relying on their internal resources. Direct involvement with the technical or tertiary education system was not common, although most workplaces recognised that this would be more important as their programs progressed.

Involving all workers in creating a shared vision was seen as an ideal; the more usual process was to include the workers 'as much as possible' and to concentrate effort on team-building and what one participant called 'company behaviours and norms' programs.

Different operating principles and practices were developed in each of the workplaces involved in the consultations. There was no attempt to do detailed case studies, and workplaces are not identified. All agreed that the substance of their discussions could be used in this manual.

Common themes

Training and education are delivery systems. By contrast, learning is the way in which individuals or groups acquire, interpret, reorganise, change or assimilate a related cluster of information, skills and feelings. It is also primary to the way in which people construct meaning in their personal and shared organisational lives. Learning takes place through daily interaction and experience within the organisation, whether or not it has been structured by trainers. It is often self-directed and self-monitored and includes informal modes such as... mentoring and working groups focused around a specific task.

This quotation, from *Learning in the Workplace* (Marsick 1987), expresses one recurring theme in the literature on this subject. It points out the all too easily forgotten fact that adults are continually learning, that they learn wherever they are and that they choose what, where and how they will be learning.

Good adult learning practice has always recognised and used this awareness to make sure that learning programs are structured to meet the preferences and needs of the learners. To do this they are exploring theories about how adults and organisations learn and are using techniques arising from these theories.

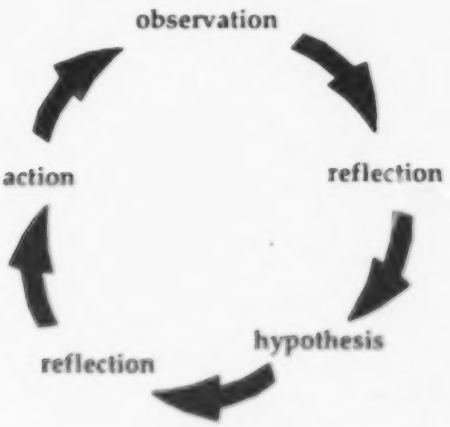
Workplaces, often driven by the need to meet new challenges to become more productive and to utilise the skills of the workforce more effectively, are turning their attention to maximising the opportunities for learning in and by the organisation.

Senge, Argyris and Schön in America and Garrett, Pedler, Burgoyne and Boydell in the United Kingdom have all written about the Learning Company or Learning Organisation.

The literature of learning in the workplace contains several major themes and much of it grows out of the pioneering work of Revans (1980), Argyris and Schön (1978).

In the 1960s R Revans developed a process he called action learning and promoted its use in industry and the academic world in England and Europe. The process is a cyclical one 'in which a group of people jointly identify a problem, experiment with a solution, monitor results, reflect critically on the process and use the resultant information to reframe the process and try out a new solution' (Marsick 1987).

The use of these 'action sets' has proved of great value in both solving specific problems and in providing opportunities to learn and practise a variety of skills. The 'action learning' cycle can be represented by



Argyris and Schön take this idea a step further with their development of action science which is 'concerned with the analysis of unspoken norms, rules, inferences, value judgements and assumptions' (Marsick 1987).

They have also suggested the possibility of single and double loop and deutero learning.

When an organisation engages in deutero learning, its members learn, too, about previous contexts for learning. They reflect on and enquire into previous episodes of organisational learning or failure to learn. They discover what they did that facilitated or inhibited learning, they invent new strategies for learning, and they evaluate and generalise what they have produced.

– Argyris and Schön 1978

Australia, too, is reflecting this change in thinking about the role of learning in the workplace.

Changing organisational contexts and new priorities have led to the possibility that learning will become part of the strategic initiative of the corporation, such that the knowledge possessed by employees will be seen as a critical component of that organisation's competitive edge. As this occurs, learning will increasingly need to be both formal and informal, individual and organisational, discrete and continuous.

– Watkins 1991

The linking of industrial award restructuring and enterprise agreements to national standards and to creating career paths has provided an added impetus to the growth of learning in the workplaces undergoing rapid and fundamental change.

To meet this pressure organisations are rethinking the way in which they organise training, and moving towards the realisation of a learning environment in which training is but one of many types of learning opportunities made available.

According to Senge and McNeil many 'leading edge' organisations in the United States are undergoing a major change in their thinking.

Characterized by a move towards trying to create a new type of organisation – 'Learning Organizations', organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.

– Senge 1990

Germany, seen to have been successful through its reliance on a strong vocational training system is looking also towards a learning environment philosophy.

Many companies are determined to make changes. Recognising and making full use of the learning potential inherent in work is being placed at the forefront of corporate training policies.

– Laur-Ernst 1992

In Britain the Learning Company proponents, led by Pedler, Burgoyne and Boydell are able to state:

The Learning Company is here because the ideas of organisation, training and development and quality management have evolved to that point.

– Pedler, Burgoyne, Boydell 1991

Both Lusterman in America and Rigg in Europe comment on the changing role of trainers:

Designated trainers are seeing their role shift from being primarily concerned with delivering training to providing support for line managers and others in carrying out their training responsibilities.

– Rigg 1991

They also draw attention to the way in which training is becoming more integrated into the organisation's strategic planning. Lusterman [no date] quotes a training director as saying 'It's a whole new approach – from presenting courses to contributing to the organisation'.

In the United Kingdom, Margaret Levy and other members of the Work Based Learning Project have worked for ten years to develop tools and processes which enable workers to discuss the underlying skills (Core Skills) that they use, identify their learning needs and participate in the planning of diverse learning programs. Their intent has been to develop an informed workforce and encourage workplaces to 'work from the ground up' in identifying resources and structuring work based learning options.

McNeil, Senge and Garrett all focus on the learning needs of managers and chief executives and propose ways in which senior executives can demonstrate commitment to an organisational vision and model the values and attributes that they wish others to demonstrate.

Three themes are clear from a survey of overseas material on workplace learning.

The first is the need for strong but not authoritarian leadership, for energy and commitment from senior managers and politicians that will evoke a like response from all employees and the public. Openness, co-operation and participation in policy formation and decision making is seen as important in creating organisations that can transform themselves to face the demands of a fast changing world.

The second theme is the need for learning environments which will respond to the needs of both organisation and employees, which will recognise existing skills and reward learning.

The third theme is the introduction of learning in the workplace into the strategic plan and daily operations of the workplace.

Australian trends

Discussion about the role of education in Australian workplaces has been dominated by economics and industrial reform and by issues surrounding the introduction of competency based accredited training programs.

The progressive introduction of a competency approach to training is the cornerstone for reform of the vocational education and training system in Australia. This reform has been strongly driven by the macro-economic agenda to make Australia a more prosperous country by reducing the imbalance in the balance of payments.

– VEETAC 1991

The introduction of the Australian Vocational Certificate (planned to be introduced progressively between 1995 and 2010) will see many Australian students moving from school to work through four levels of competency-based vocational training combined with work.

With the encouragement of governments, peak unions and employer bodies, several tripartite missions have visited various overseas countries to investigate how they are dealing with the pressures of technological change and increasing international competition. Each mission returned with a determination to see their industry restructured to meet goals such as those set by concepts such as 'International Best Practice'.

More training, and changes in its design and delivery, was seen as vital, as this recommendation from *Patterns of Change* (Department of Industrial Relations 1992) demonstrates:

That, to ensure that the formal training system is more responsive to Textile Clothing and Footwear industry and enterprise needs, the Industry Training Council network promote a range of initiatives including those that provide accreditation and portability of skills, maximise flexibility in delivery and link training at all levels to career paths under restructured industrial awards.

The introduction of the Training Guarantee legislation has also focused attention on training, especially in smaller workplaces where there has been little tradition of training.

One result of this industry focused approach to training has been that TAFE colleges and other education providers are seeking partnerships with industry and there is increasing activity in the collaborative design of industry or enterprise specific learning programs often using new technology such as interactive video.

In parallel with the trend towards industry wide training programs there has also been a quiet move by some workplaces towards highly individual solutions to their training 'problems'.

This also raises the issues of the importance of self-directed learning and learning-to-learn in the workplace. These are key issues for new work organisation and enterprise behaviour, and are development skills that parallel the movement towards multi-skilling, flatter organisational structures and devolved line responsibilities.

– Carter & Gribble 1991

The two volumes of the Work Based Learning Project document describe how this has been done in nine workplaces. Although each workplace has chosen to act in a different way there are strong similarities in the values they hold and their concern for staff development.

There is increasing recognition that the objective of training reform is to promote quality and effective learning which produces outcomes that can be related to, and validated by, industry needs.

– Holmesglen College of TAFE 1992

The project identified eight interrelated key characteristics which are similar to the seven in this volume.

The key characteristics of the Work Based Learning Projects are:

1. Strategic vision
2. A Total Quality Approach
3. The organisation as a Purposeful Learning System
4. The organisation as a Community
5. New approach to Industrial Relations
6. Work Based Learning approach to Skills Formation
7. Work Organisation
8. Employee Development.

Similar lists of characteristics have been generated in a number of countries and for a variety of industry sectors. A list developed for schools of 'twelve key factors which affect the quality of student learning' includes:

- purposeful leadership
- involvement of teachers
- a work-centred environment
- maximum communication
- positive climate
- parental involvement.

– Russell 1992

With the change of a few words this list would apply to almost any industry.

(Throughout this section of Part 3 comments which appear as direct quotations are taken directly from the researcher's transcripts of workplace consultations.)

Workplace A

In this workplace (approximately 800 employees in seven production centres) the establishment of a Total Quality Management program in 1990 was facilitated by a consultant. A five year program, now in its third year, has seen the appointment of more training personnel and their involvement with other staff in a broadly based program that includes

- identifying skill requirements
- identifying individuals' training needs and career paths
- restructuring jobs and classifications
- supervisor training
- TAFE bridging program delivery on site
- internal Train the Trainer programs
- investigating the possibility of becoming a registered training provider
- customer satisfaction training
- establishing and supporting Quality (Q) teams (currently 20).

The Q teams are working on a variety of problems, some cross-functional. Participation is largely voluntary but some participants are selected because of their experience or special skills. These teams are seen as 'empowering people as well as solving problems'.

Progress has been slow with a need to keep providing training and support for team leaders/facilitators.

The workplace aims to move to autonomous work groups within a period estimated to be one to two years. Most progress has occurred in the large city workplace; extension into the regional locations is planned.

This organisation believes that its major focus for learning should be internal for a number of reasons.

- It uses existing skills and experience.
- It is a known comfortable environment for learners.
- It enables specific needs to be identified and met.
- It preserves the 'company's competitive edge'.

In this organisation, management believes that creating a learning environment is important. This is what they are attempting to do in the belief that 'learning makes changes in culture, structures and processes'.

Workplace B

A large heavy industry workplace with 1600 staff (1200 production workers) in three main work centres.

In this organisation, the focus is on departments organising their own training, and a central training consultative group monitors the availability of all types of training across the organisation.

The organisation has developed mission statements at company, business, unit and team levels and training plans are developed with these in mind.

The process is focused on individual employee development and follows this pattern:

department needs

▼

team mission

▼

team development process

▼

specific competencies required

▼

individual skills profiles

▼

identified training needs

▼

individual training plan

Training is 'business needs driven, department based and collaboratively developed'. Most is designed and delivered in-house using trainers to support skilled operators who develop special curriculum materials. Material designed is self paced and sometimes computer based. Partnerships have been established with TAFE and universities and some existing technical and management training material has been adapted to meet the needs of the organisation. The need to develop new ways of working with external education providers is recognised.

Mentoring is a feature , and volunteers are provided with the support and training they need to be effective. Much of the mentoring is team based with team leaders taking on the responsibility.

A key concern is to develop criteria for selection of the most effective training co-ordinators and skills coaches, roles seen as vital in the development of a learning culture.

This large workplace sees the implementation of a comprehensive training program as a vital part of developing a true learning environment. The program is designed to meet both the needs of the organisation to be internationally competitive and the need for individual employees to learn new skills and have access to career progression.

Workplace C

In local government, the implementation of a restructured award has led to job redesign with the aim of 'multi-skilling and up-skilling' employees at all levels. Training is seen as very much 'embedded in these processes'.

Discussions were held with human resources and training personnel in three councils; in a large city, an outer suburb and one country area. Their responses and the activities in which they were involved were very similar so they have been combined into a composite local government workplace.

Analysing the needs of each workplace, in most cases department by department, has been the first stage, followed by planning appropriate training programs. In each location, developing individual learning plans was seen as the key to building commitment to the restructure process as well as the best way to identify needs.

Training has not been regarded as important in the past in some areas of local government, nor have relevant training programs always been easily available. However, these and other councils are now actively involved in providing learning and training opportunities for workers at all levels. As one interviewee stated, 'Within my own organisation I have been working towards the development of a "learning" environment rather than the "training" environment we have in place. I see this as a long-term project which must be linked to a cultural change within the organisation'.

Workplace D

This workplace is a true learning environment in that it provides technical training to employees of a group of allied companies in one industry.

The training centre also has a major role in 'selling' the role of training throughout the group to managers, supervisors and employees.

One regular program involves mixed teams from various locations within the group in a workshop situation where they have to form a working team, learn new skills and produce an item within a three week period. The trainer teaches technical skills, models team building and communication skills and provides some support, but basically the work team members find their own ways to complete their task.

The training manager expressed the view that, 'learning environments generally are a result of good management practices and clearly established goals/objectives for everyone'.

He also commented that 'the CEO must want it and sell the need (for a good learning environment) to managers and facilitators must sell it to everyone and make sure it happens'.

Workplace E

In a medium-sized components manufacturing workplace of 200 employees, the supervised production line has been replaced by semi-autonomous work groups responsible for their own quality control and for negotiating directly with their customers over quality issues and design changes.

The workplace employs a large number of people from a non-English-speaking background, so communication skills are an important part of the training program. Workers have been involved in rewriting standard operating procedures in their work areas.

A performance appraisal process includes setting and regularly reviewing learning objectives.

Workplace F

This workplace is actually many, with a large number of part-time and casual employees working on many sites. There is a core workforce of 2000 regular casual staff but this number increases to 10,000 at busy periods. Training provides the means by which casual staff acquire professional skills, and recognition of prior learning is a feature. A basic program is offered providing access to an accredited industry training program.

An enterprise agreement negotiated between unions and management contains provisions for access to training, and senior management sees it as a priority. Training needs analyses are conducted and specific training programs developed to meet the needs identified.

Again, a performance appraisal process is used to identify individual career goals and learning needs.

Workplace G

This workplace also operates on several locations and is 'in a constant state of change'. This has led to a flatter management structure, some job redesign and a need to support those attempting to manage change successfully.

The organisation recognises achievement both informally ('you did a good job there') and formally through encouraging internal promotions. Regular meetings of managers contain segments focused on some aspect of learning.

Individual learning plans are important, as is recognising the fact that 'the learning has to be valuable for the organisation'.

The workplace has a very clear view of the role of the manager as a leader who pulls people along by his or her commitment to the vision of the organisation and who has the skills to enable others also to own the vision.

The need to clearly define roles and responsibilities at all levels was stressed.

Workplace H

This workplace employs around 200 people engaged in a production process. In the past a training plan was developed to meet the perceived needs of the organisation at the time. However, the departure of the training manager and a restructure which followed the acquisition of the company by a new owner meant that the plan was not implemented. Current activity is aimed at identifying the learning needs of individuals and building 'from the ground up' a program that will recognise prior learning and provide access to training programs offered through TAFE colleges. Current internal training concentrates on team-building skills.

Workplace I

This very large national organisation operates as a series of independent business units which are pursuing separate paths towards creating a learning environment.

Interstate, one unit is making a conscious effort to establish a learning organisation using the processes suggested in Peter Senge's book *The Fifth Discipline*.

Nationally, around 300 junior and middle level managers are involved in a development project jointly developed and operated with a university. This program relies heavily on a mentoring system which pairs experienced senior managers with program participants. Each mentor/participant pair is expected to set clear goals, and the progress of the relationship is carefully monitored and supported.

Glossary and bibliography

Glossary and bibliography

Glossary

Accreditation

is used in two ways to refer to accrediting individuals or training courses:

- The process of formal and public recognition of an individual's skills, knowledge, experience or competence
- Official recognition or assurance by State or Territory vocational education and training authorities that:
  - the contents and standards of a course are appropriate to the certification to which it may lead;
  - the course and the methods adopted in delivering it are likely to achieve the purpose for which it was or will be introduced;
  - the curriculum, including assessment and methods, will enable the achievement of the required competency and national standards where these have been established by the National Training Board.

Articulation

- The formal link between different levels or fields of study, including enterprise or industry based training. Articulation arrangements allow horizontal or vertical movement between programs or between education and employment

Assessment

- The process of forming a judgement about whether an individual meets a specified standard.
- Assessment may be used for a variety of purposes:
  - assessing a learner's progress for feedback purposes;
  - assessing achievement of a part or the whole of a learning program for reporting to others;
  - diagnosing learning needs or difficulties for prescribing action suited to the learning.

Award restructure

- The process of changing existing awards to improve efficiency and meet needs of industry.
- The provision of better opportunities for workers in the industry.

Award restructure negotiation processes may look at such issues as:

- simplifying or broad banding classification structures to provide better career opportunities for multi-skilling;
- flexibility in hours, modes of employment;
- identifying needs and access to training.

Basic skills

- This term is used in a variety of ways:
  - those skills basic to a learner's progression into higher level education or training;
  - fundamental skills for communication which include reading, writing, mathematics, speaking, listening and communication.

Brainstorming

- A small group technique for generating ideas where all contributions are expressed without regard to quality. Evaluation or selection occurs only at the end of the session. Exploration and elaboration of one person's ideas by others is encouraged.

Certification

- The provision of a certificate or public statement of achievement, based on evidence obtained in the course of assessment.

Coaching

- One essential activity of a mentor; may include motivation, team building or teaching specific skills. Coaching may also be used to describe the role of a team leader.

Competence

- Achievement of the knowledge, skills and attitudes required in order to perform a given task to an agreed standard.

Competency

- The specification of knowledge and skill and their application to the standard of performance required.

Core skills

- Those skills which are common in a wide range of tasks and which are essential for competence in those tasks.

Credit transfer

- The acceptance of an award or credit obtained for one purpose or in one organisation/institution, as credit towards another award (see also recognition of prior learning).

Curriculum

- A structured series of intended learning outcomes.

Enterprise agreement

- A certified agreement between management and unions within an organisation to restrictive industrial awards and work organisation.

Facilitator

- A person providing the necessary information, resources and organisational support for workplaces undergoing change.

Generic skills

- Those skills which are fundamental to a class of activities and are transferable from one job, occupation or learning activity to another.

Individual development plan

- A means of specifying and reviewing a program of learning for an individual learner – also referred to by a variety of other names such as:
  - Individual Career Plan
  - Personal Development Plan
  - Staff Member's Development Plan

Interpersonal skills

- Those skills used in relating to, communicating with and dealing with other people.

Job redesign

- Alteration to the content of jobs, usually as part of an organisational restructure, to make jobs more rewarding, encourage multi-skilling and provide better career paths.

Job rotation

- A process of exchanging jobs, or moving workers from one area to another where they can learn new skills, or better use existing skills.

Key competencies

- Those competencies essential for effective participation in the emerging patterns of work and work organisation. They are generic and focus on the capacity to apply knowledge and skills in an integrated way in work situations.

Learner-centred learning

- Education or training which gives priority to learning and the needs of the learner – the curriculum and mode of instructions is designed around the learner.

Learning environment

- A workplace environment which encourages, recognises and responds to a wide variety of learning programs and opportunities.

Modular learning programs

- Those organised in modules – relatively discrete and self contained units of learning which may be aggregated into a certificated course or other extended learning program.

Multi-skilling

- Broadening the range of tasks which a worker may be required to perform.

Participative learning

- Learning activities designed to meet specific learner objectives and actively involving the learner in the design process.

Recognition of prior learning

- Acknowledgement of a learner's skills and knowledge irrespective of how they have been acquired. It is the recognition of performance/competence, not of the method or place of learning. It values the learning gained through work, life experience and other avenues.

Skill

- An organised and co-ordinated pattern of activity, gained by practice or knowledge, and used to carry out a task or part of a task.

Skills audit

- A systematic process which identifies the present stock of skills or competencies held by the workforce (whether or not they are being actively used) and/or the skills and competencies that are needed in the workplace.

Task analysis

- A process for identifying the skills, knowledge and attributes required to do a particular task.

Training

- In Australia, usually refers to award courses, training programs and other opportunities for skill acquisition, formal and informal, that are related to vocational outcomes.

Transferable skills

- Skills that enable workers to transfer knowledge and training into new contexts. Also referred to as Core Skills or (in Australia) Key Competencies.

Vocational

- Two uses are common:
  - vocational training that teaches the technical skills required to do a specific range of jobs
  - vocational education which also includes the underlying or transferable skills which equip people for employment and mobility within the workforce.

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